Appendix 6
Bird and wildlife watching

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Table A6.1: Summary of sample confidence levels

Responses	Spatial data	Questionnaire data
<30	Very low sample – interpret spatial data with great care	Very low sample – do not analyse questionnaire results
30 – 60	Low sample –interpret spatial data with care	Low sample –analyse questionnaire results with caution
60 -100	Medium sample – good spatial data	Medium sample – analyse questionnaire results with care
>100	**Robust sample**	**Robust sample**

This table summarises the confidence that can be placed in spatial data and questionnaire data as a result of the corresponding sample sizes. This is described in more detail below.

Definition

1. This category gathered information on bird and wildlife watching along the coastline and on the open sea. It includes informal visits, visits to nature reserves and organised or led trips.

Sample sizes

2. The survey collected information on participation in recreation and tourism activities in two ways. Firstly, survey respondents were asked to list all the activities they had undertaken during the previous 12 months, completing a map for each. Secondly, they were asked to identify the one or two activities that they considered most import. They were asked a series of questions relating to their participation in these activities.
3. A total of **933** people provided spatial information on bird and wildlife watching, representing around 40% of the total sample. **176** people identified bird and wildlife watching as one of their most important activities, representing around 8% of the total sample.
4. These are good samples meaning that confidence in the analysis of responses is high. This does not mean the data are fully comprehensive, particularly in parts of Scotland where the host population and visitors are relatively low.
5. Around 19% of those who provided spatial data on for bird and wildlife watching identified it as one of their most important activities.
6. Based on the sample of people who provided spatial information, around 47% of respondents lived within a mile of the Scottish coastline, 17% between one and five miles and 24% more than five miles. The remaining 12% of respondents came from outside Scotland.

Spatial data

7. People completing the survey identified 1775 areas where they had been bird and wildlife watching. This information has been used to generate a heat map showing the concentration of bird and wildlife watching activity around the Scottish coast (see **Map A6.1**). This shows some very clear patterns with concentrations of activity along the west coast from Arran north to Torridon, within the inner Moray Firth and, to a lesser extent, the Firth of Forth. This map is available on Marine Scotland's National Marine Plan Interactive (NMPi) website (https://marinescotland.atkinsgeospatial.com/nmpi/).

8. **Figure A6.1** shows the percentage distribution of bird and wildlife watching across Marine Regions. It shows concentrations of activity in the West Highland, Argyll and Moray Firth Marine Regions. The Outer Hebrides, Orkney, North East and Shetland are relatively importance when compared to the survey results as a whole, and, conversely, Clyde and Forth Tay are less important than for the whole survey sample.

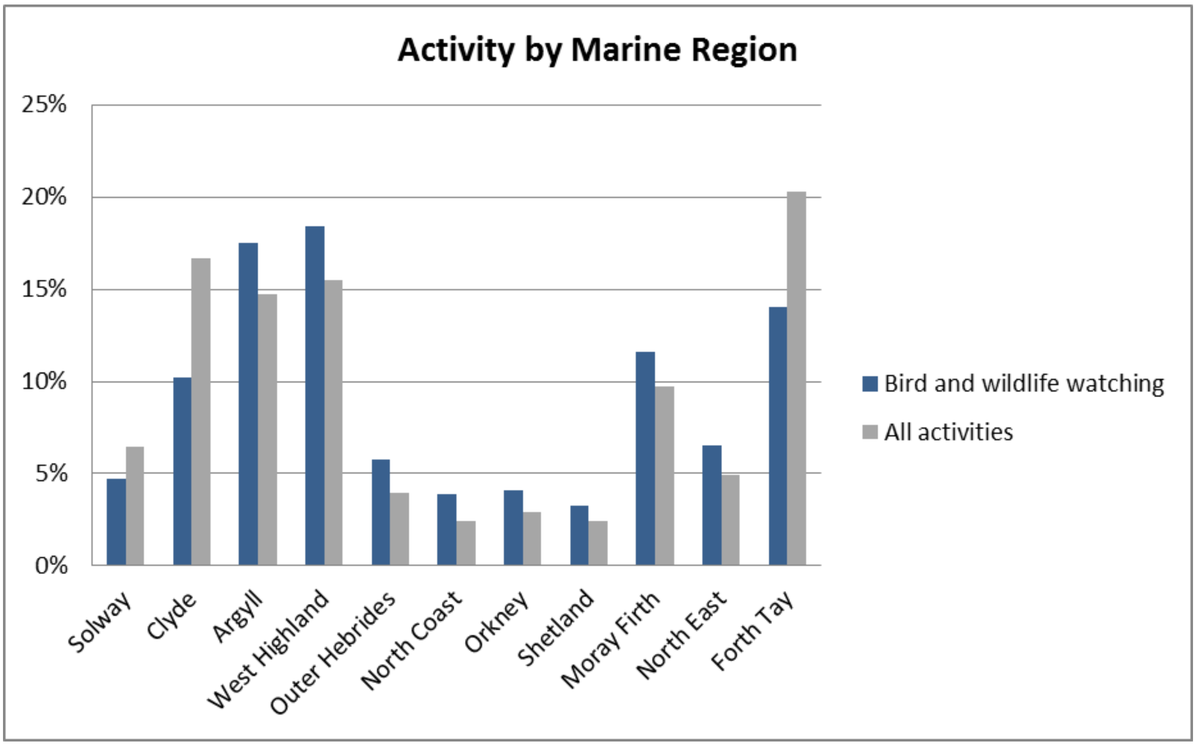
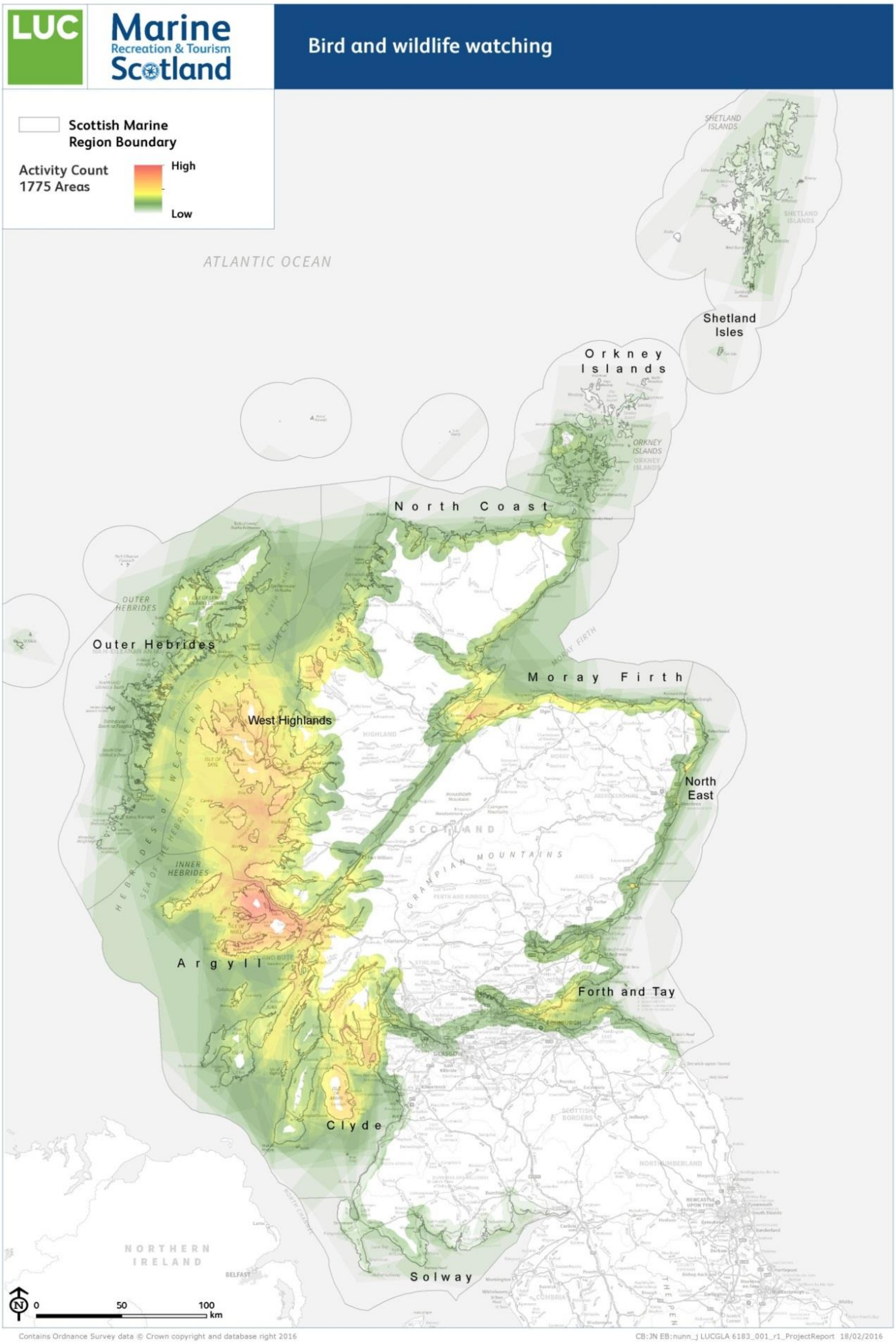


Figure A6.1: Bird and wildlife watching – spread of activity across Marine Regions (%)



Map A6. 1: Bird and wildlife watching (933 responses)

Trip planning

9. Respondents were asked about the factors influencing their decision on where to go bird and wildlife watching, and about the sources of information they used to inform that decision.

Factors influencing decisions on where to go

10. As would be expected, the possibility of seeing wildlife is by far the most important factors influencing where people go for bird and wildlife watching. Other important influences include the presence of attractive scenery, recommendations and the presence of historic and cultural heritage. Less important factors included whether the place had been visited before, the availability of activity specific facilities, the availability of accommodation, and the range of other things to do, including pubs, cafés and restaurants.

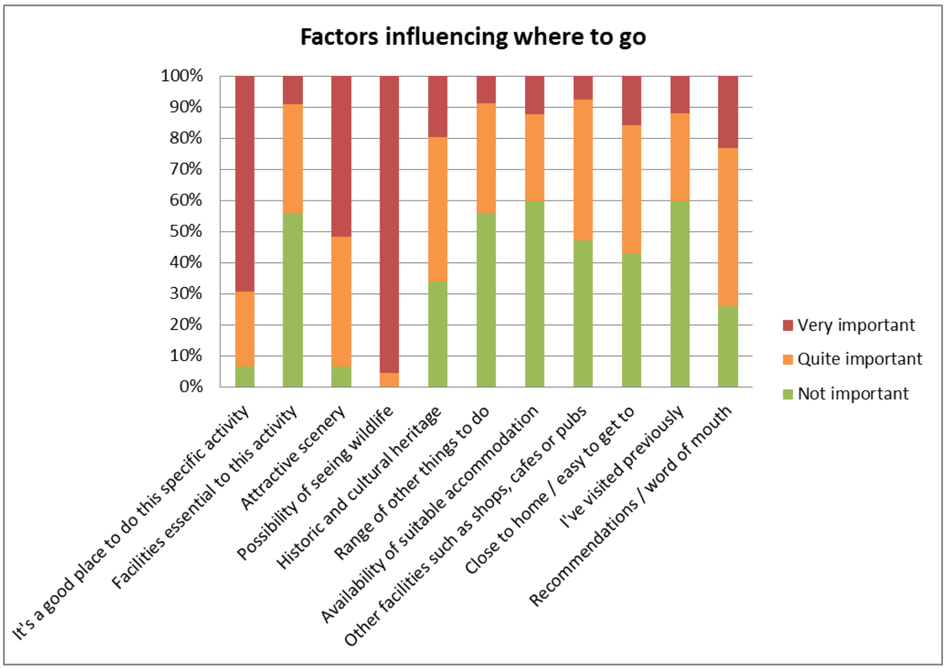


Figure A6.2: Bird and wildlife watching – factors influencing where to go

Sources of information

11. People's own knowledge of the Scottish coastline, together with recommendations from friends and family and websites are the most important sources of information when deciding on where to go. Magazines, guidebooks and clubs and associations play a lesser role.

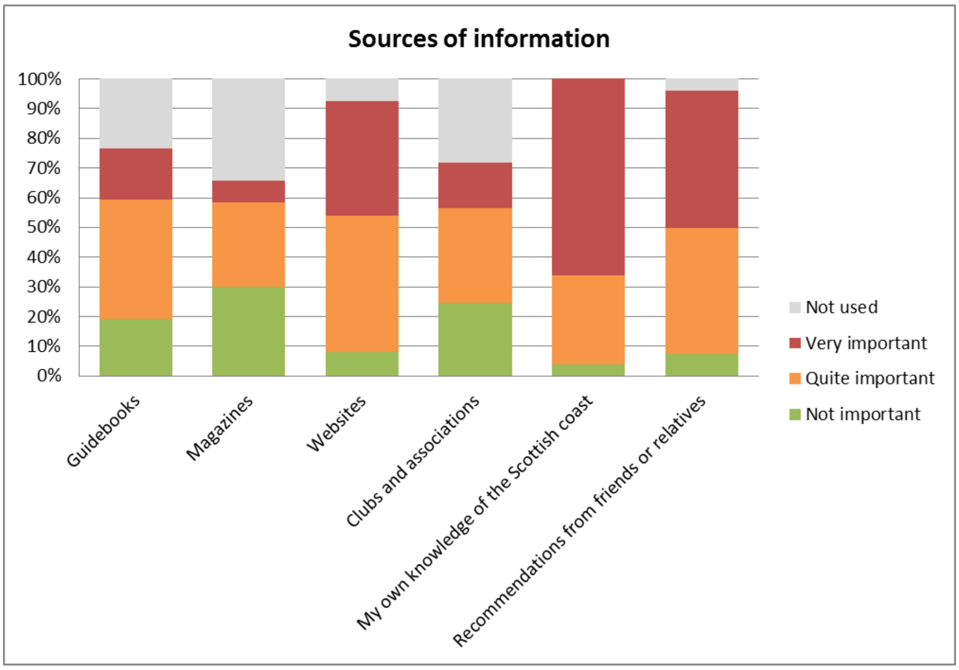


Figure A6.3: Bird and wildlife watching – sources of information

Characteristics of trip to the coast

Transport to start point

12. Car is by far the most common mode of transport to the start of people's visit to the coast, with around 60% of respondents indicating they always travel that way, and most of the remainder indicating they sometimes go by car. Around 80% of people always or sometimes walk to the coast. Around 55% of people sometimes use ferries, while between a quarter and a third of respondents used buses, trains and bicycles.

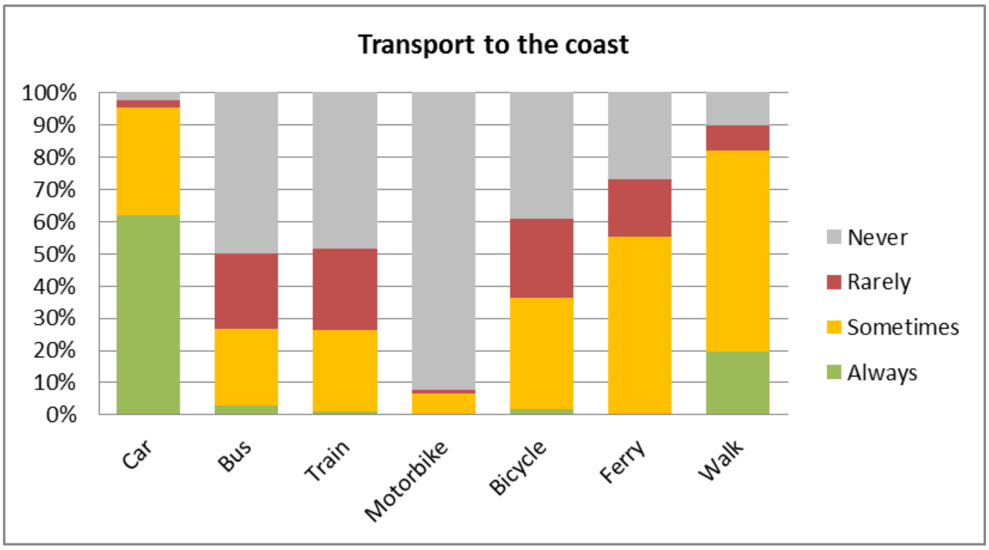


Figure A6.4: Bird and wildlife watching – transport

Monthly profile of activity

13. **Figure A6.5** shows the frequency of bird and wildlife watching activity across each month of the year. While the graph shows an increase in activity through the summer months, it is evident that bird and wildlife watching continues throughout the year, with around a third of respondents indicating that they undertake this activity at least weekly during the winter months. This may reflect the fact different species are evident throughout the year, and that bird and wildlife watching can be combined with a range of other activities, including coastal walks.

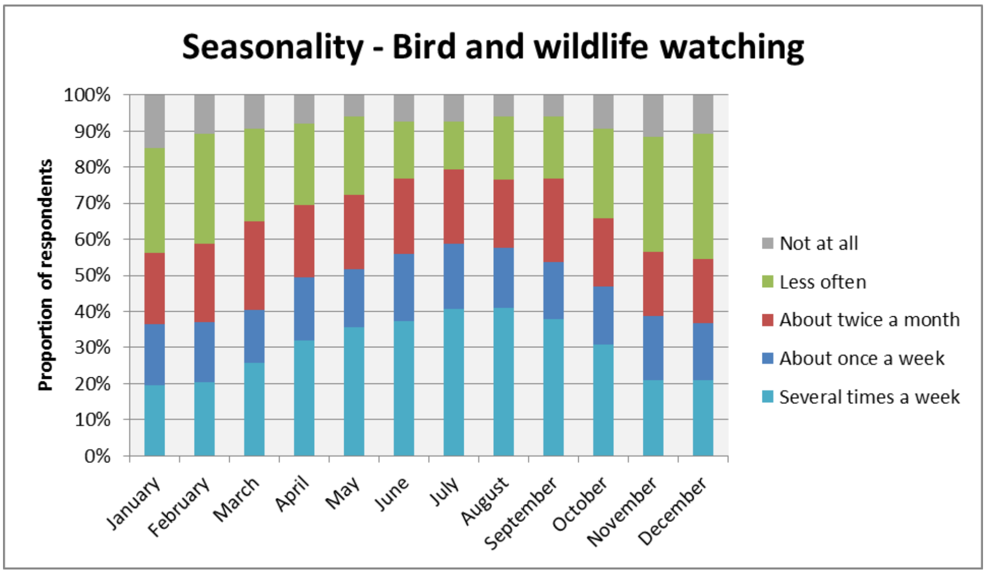


Figure A6.5: and wildlife watching – seasonality

Trip length

14. Bird and wildlife watchers made an average of around 6.8 day trips, just under 1.6 short breaks and 1.2 longer break per year. Comparison with the whole survey sample indicates more day trips but fewer short and longer breaks.

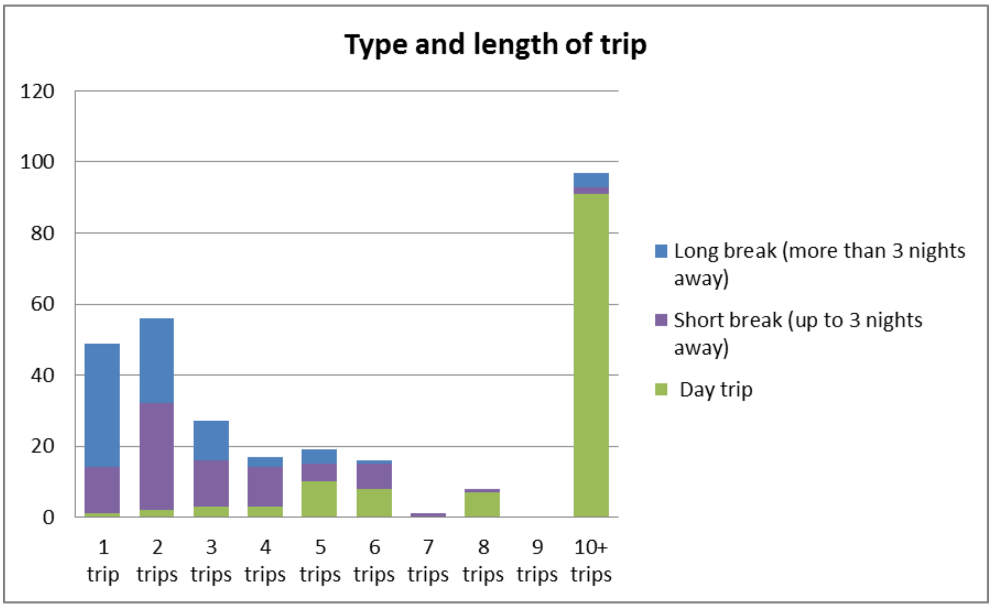


Figure A6.6: Bird and wildlife watching – type and length of trip

15. The sample of 176 respondents accounts for a minimum of around 1090 day trips, 258 short breaks and 194 longer breaks.

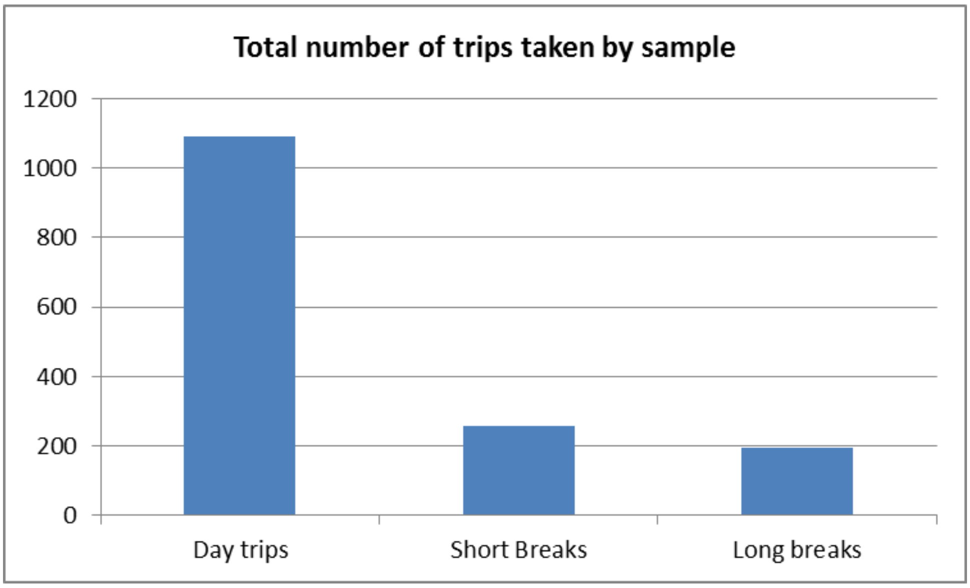


Figure A6.7: Bird and wildlife watching – total number of trips

Accommodation used

16. People provided information on the types of accommodation they typically use. Self catering, staying with friends and family, camping, bed and breakfast and hotels were the most commonly used forms of accommodation.

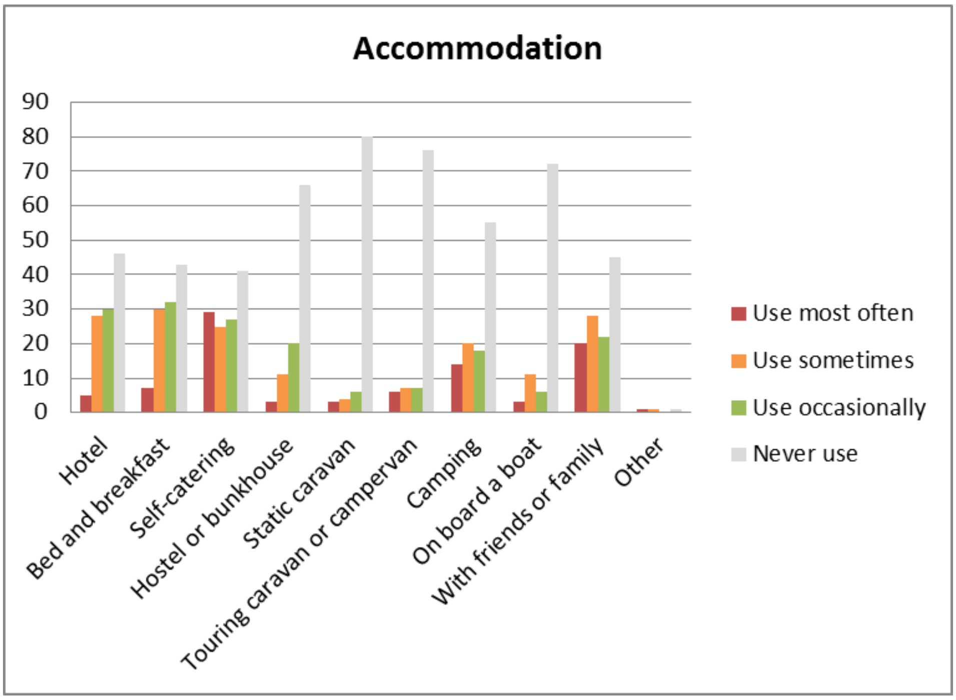


Figure A6.8: Bird and wildlife watching – accommodation

Improvements to make trip more enjoyable

17. Bird and wildlife watchers tend to identify the need for fewer improvements than people undertaking most other forms of recreation and tourism. The most commonly cited improvements related to on-line information, on-site information and signage, parking and transport.

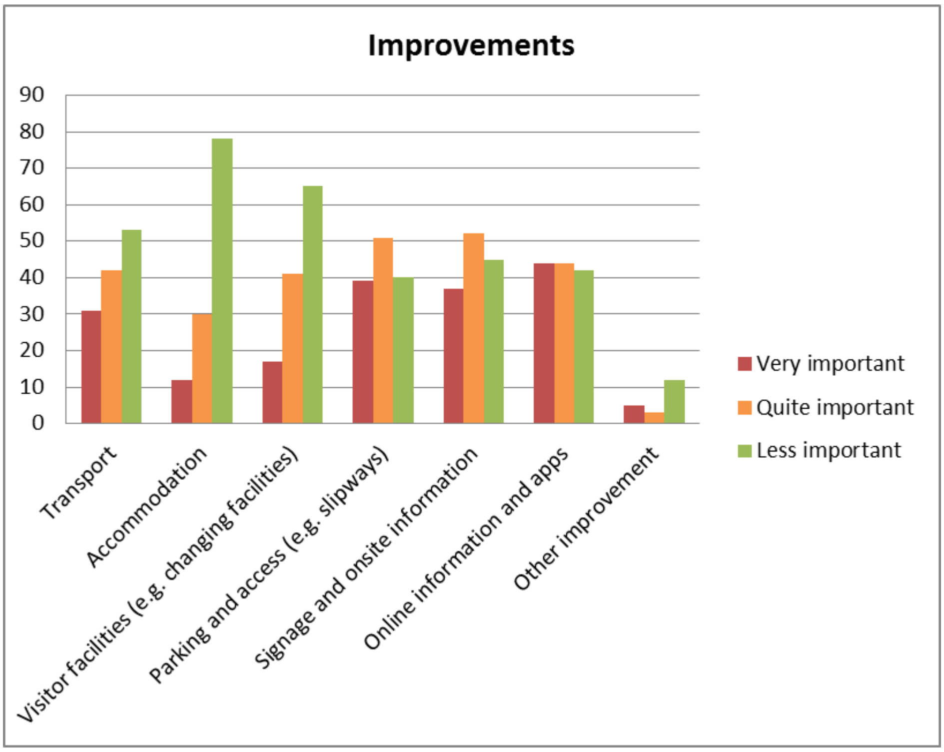


Figure A6.9: Bird and wildlife watching – improvements

Party

18. Respondents were asked a number of questions about the people they are normally with when undertaking their chosen recreation or tourism activity.

Who was with you?

19. **Figure A6.10** suggests that bird and wildlife watchers are more likely to be with their partner or family and less likely to be with friends than the survey sample as a whole. People were least frequently with members of an organised trip.

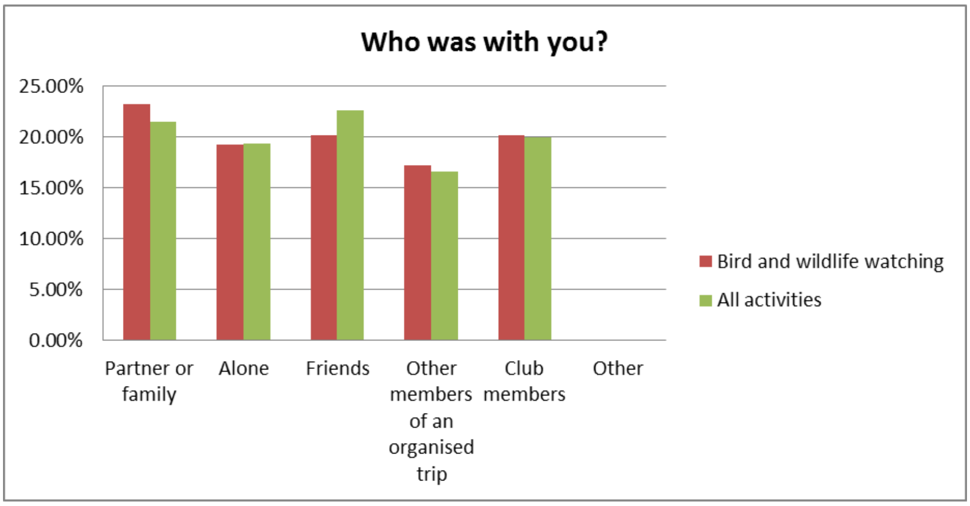


Figure A6.10: Bird and wildlife watching – party

Age groups and gender composition of party

20. Respondents were also asked about the age and gender composition of their party[33]. **Figure A6.11** shows bird and wildlife watchers tend to be in smaller parties than for the survey sample as a whole. Parties most commonly comprised people in the age groups between 16 and 65, with similar numbers of men and women across all age groups.

[33] * respondents were asked whether there were 1,2,3,4 or 5 or more people in each age/gender category. For the purposes of analysis, returns of '5 or more' have been taken to be '5'. As a result, the estimate of average party size is likely to be an underestimate.

Figure 3.91: Bird and wildlife watching – party composition

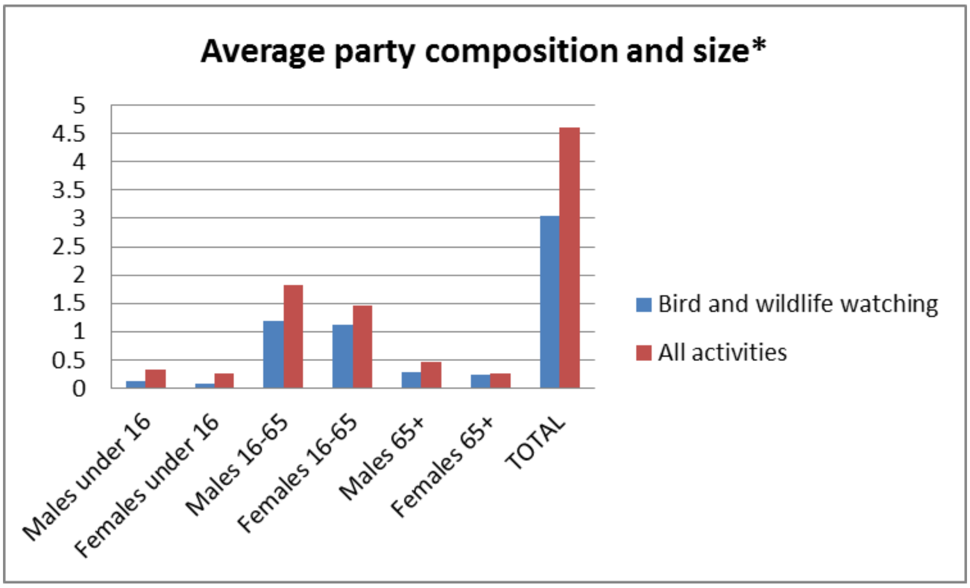


Figure A6.11: Bird and wildlife watching – party composition

Spending

21. People completing the survey were asked to provide information on how much they spent during their last visit to the coast, and how much they typically spend each year. Analysis excludes the 10 respondents who provided no information on their spending, but includes the 20 respondents who stated that they spent nothing during their trip.

Spend per day during visit by category

22. **Table A6.2** shows the maximum, mean and median daily spending against a series of headings. This analysis suggests a median spend of around £40 per day during bird and wildlife watching trips to the coast.

23. Maximum, mean and median spending under each of the categories was as follows:

Table A6. 2: Bird and wildlife watching – max, mean and median spend per day (£)

	Max(£)	Mean (£)	Median (£)
Petrol/diesel/LPG	200	20.63	10
Bus/train fares	40	10.11	5
Car parking	20	3.22	3
Overnight accommodation	700	70.25	50
Eating out	200	28.33	20
Food and groceries	200	16.56	10

	Max(£)	Mean (£)	Median (£)
Entrance to local visitor attractions	40	10.85	10
Mooring or transit fees	40	3.29	
Hire of equipment	150	16.25	
Maps/guidebooks/leaflets	40	5.31	4.5
Gifts/souvenirs	100	17.26	5
Other	250	22.84	1
TOTAL	**1155**	**88.80**	**40**

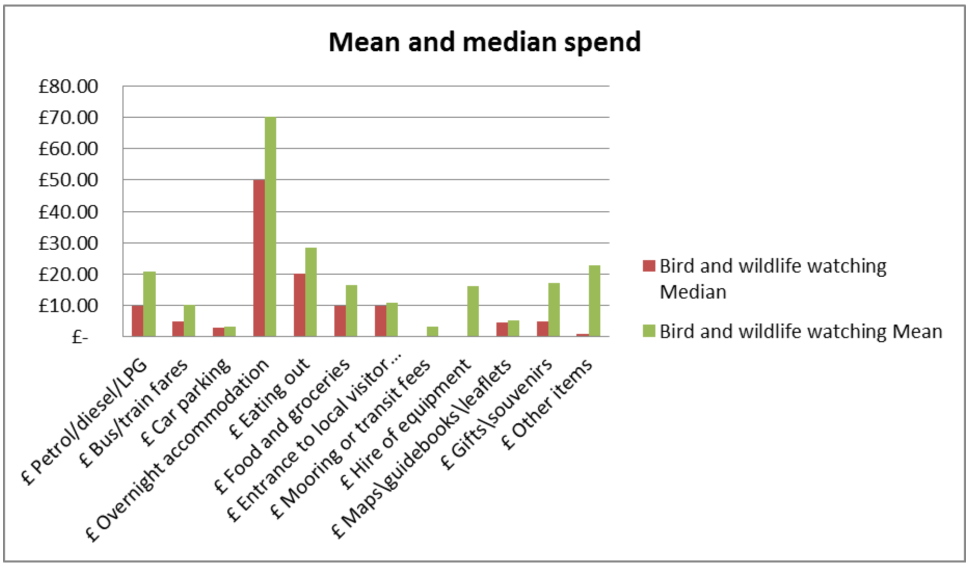


Figure A6.12: Bird and wildlife watching – mean and median spend per day

Spend per year by category

24. Respondents were also asked to record their annual spending on bird and wildlife watching. The analysis excludes the 73 respondents who provided no information on their spending, but include 9 respondents who stated their annual spending as being zero. **Table A6.3** shows the maximum, mean and median annual spend for a number of categories. The range of spending was high so the median spend figure has been taken to provide an overall value for this activity. This suggests that the median figure spent on bird and wildlife watching was £145.

Table A6. 3: Bird and wildlife watching – max, mean and median spend per year (£)

	Max(£)	Mean (£)	Median (£)
Equipment	3000	323.67	100
Storage	1500	104.71	
Memberships	400	76.41	50
Insurance	350	89.94	55
TOTAL	**3400**	**351.34**	**145**

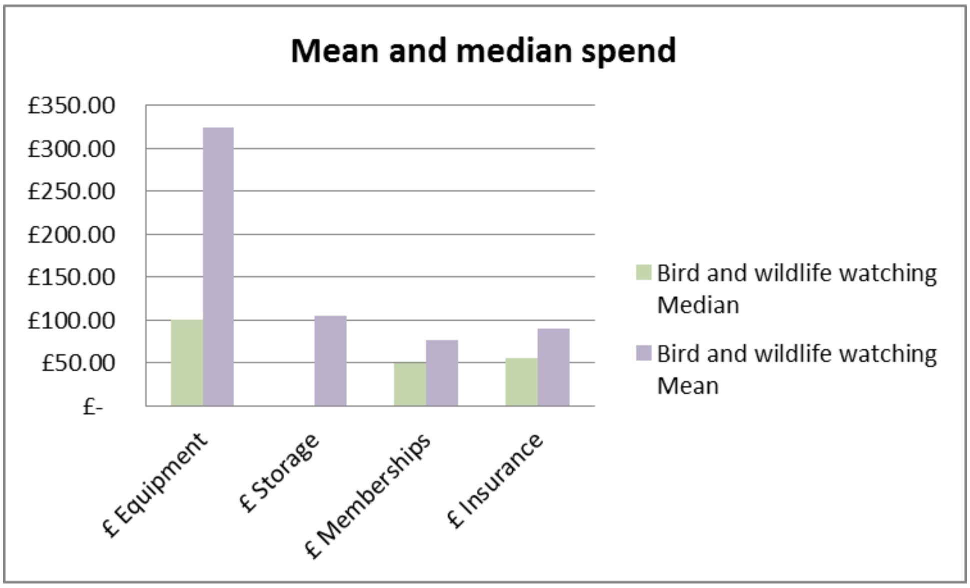


Figure A6.13: Bird and wildlife watching – mean and median spend per annum

Clubs and codes of conduct

25. Respondents were asked about their membership of clubs and their awareness of codes of conduct.

Club membership

26. Of the 162 people who answered this question, around 40% belonged to local or national organisations. 39 of these described organisations including RSPB, local wildlife groups, the Whale and Dolphin Conservation Trust, natural history societies and cetacean survey groups.

Table A6.4: Bird and wildlife watching - membership of clubs, associations or governing bodies

	Do you belong to any clubs, associations or governing bodies relating to coastal recreation?
Local organisation	34
National organisation	34
None	94
Grand Total	**162**

Awareness of codes of conduct

27. Bird and wildlife watchers had high levels of awareness of the Scottish Outdoor Access Code (over 90% stating they were definitely or possibly aware) and the Scottish Marine Wildlife Watching Code (around 88% stating they were definitely or possibly aware). Most of the other codes of conduct are specific to other activities, so it is not surprising that awareness rates are much lower.

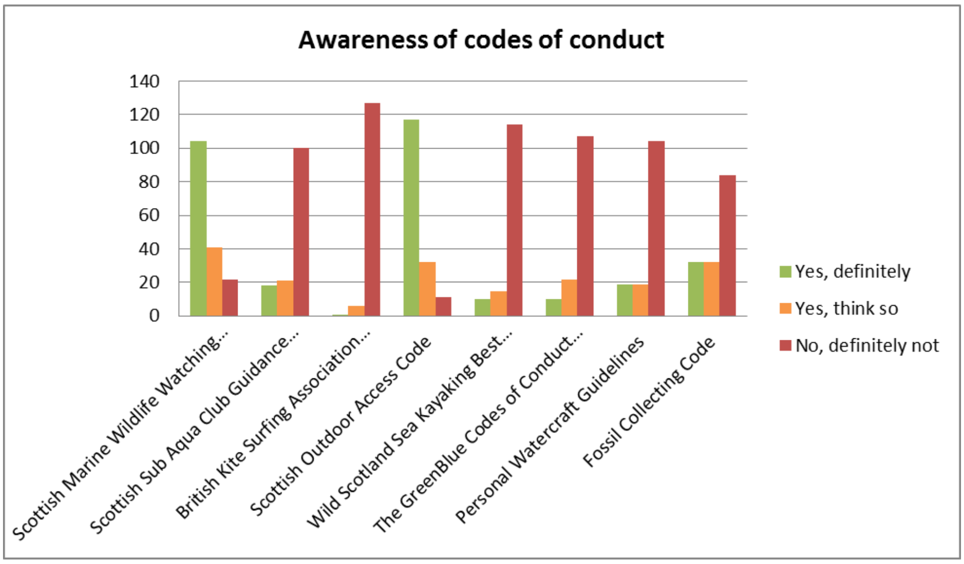


Figure A6.14: Bird and wildlife watching – codes of conduct

Socio-economic profile

Age and gender

28. **Figure A6.15** shows the age and gender profile of all those who indicated that they had taken part in bird or wildlife watching on the coast during the past 12 months. This is as distinct from those who this activity as one of their most important activities. Comparison with the whole survey sample suggests those who took part in bird and wildlife watching had a similar age and gender profile to the wider survey sample. They main difference was a higher proportion of women in the 45-65 age category.

29. **Figure A6.16** shows the age and gender profile of those who identified bird and wildlife watching as one of their most important activities. This suggests a higher proportion of females across most categories. Around half of respondents fell into the 45-65 age category, split fairly evenly between the sexes.

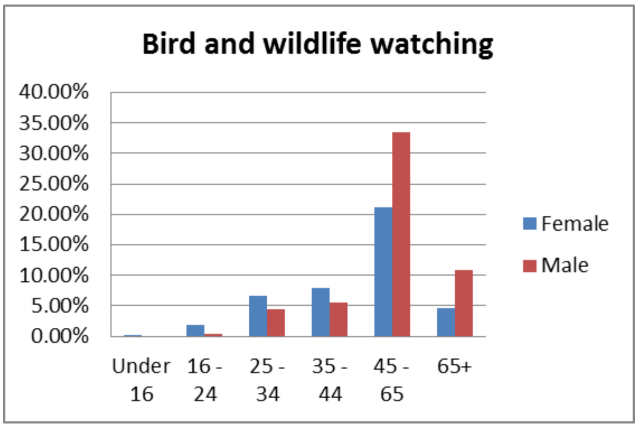


Figure A6.15: Age and gender profile of all bird and wildlife watchers

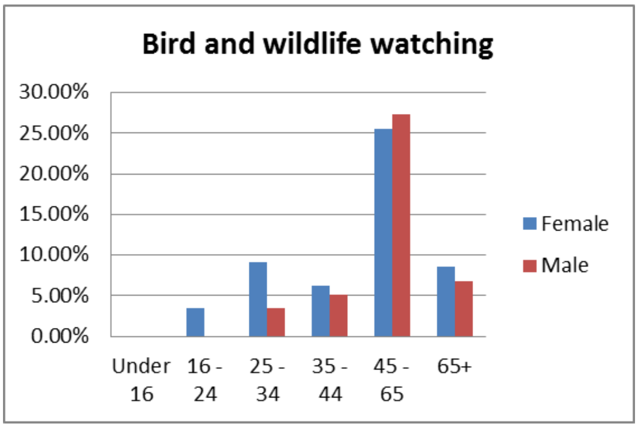


Figure A6.16: Age and gender profile of respondents identifying bird and wildlife watching as a main activity

Household income

30. Analysis of respondents' household income suggests around half of bird and wildlife watchers have incomes of £26,000 or more. This is slightly lower than for the survey sample as a whole, but indicates incomes higher than the Scottish household average (2014) of around £23,000.

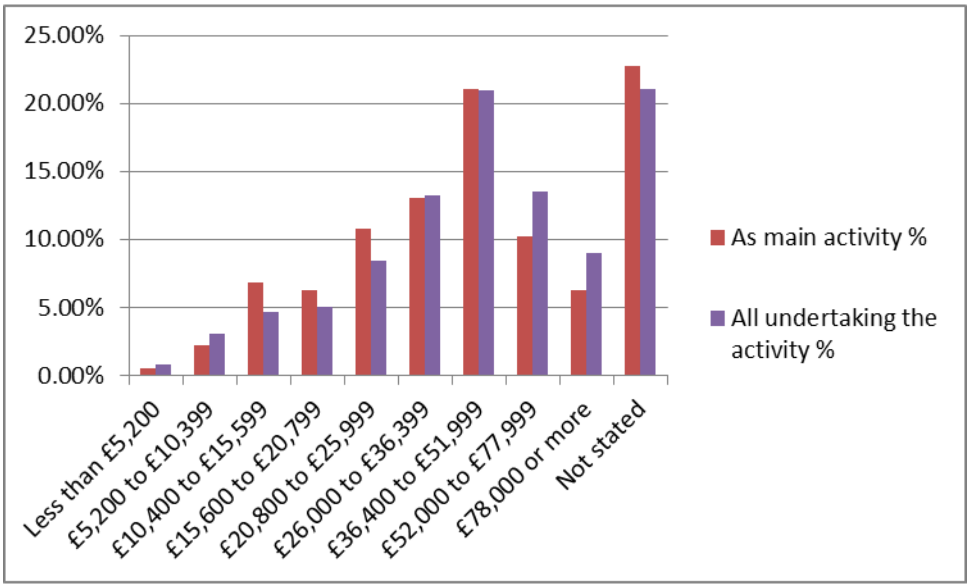


Figure A6.17: Bird and wildlife watching – household income

Business survey findings

31. 111 of the 279 respondents in the business survey stated that their business serves bird and wildlife watching. **Figure A6.18** shows the distribution of the businesses across Marine Regions. This survey is based on a small sample and the results should, therefore, be treated with caution.

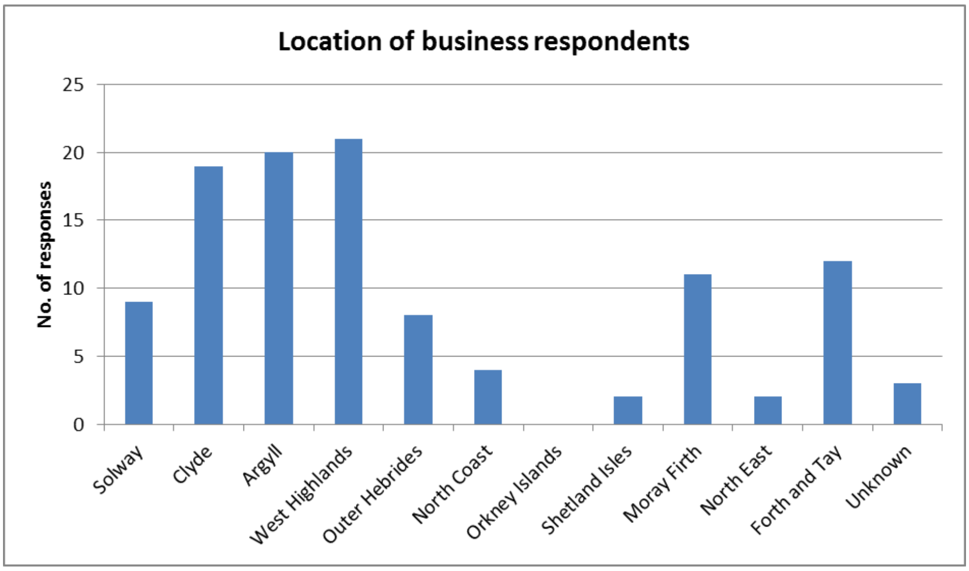


Figure A6.18: Distribution of the businesses across Marine Regions

32. Business respondents were asked to indicate the kinds of services they provide. **Figure A6.19** shows the services provided by businesses serving bird and wildlife watching.

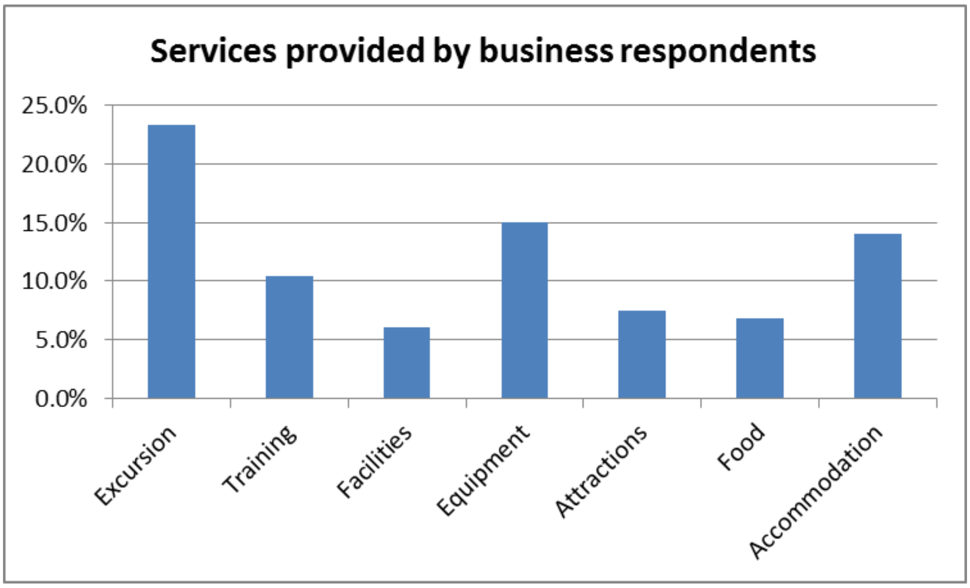


Figure A6.19: Services provided by businesses serving bird and wildlife watching